Swarthmore College

Electronic W-4 Form Creation, Update and Printing Instructions

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Overview

In the interest of sustainability, Swarthmore College requires employees to create and update their W-4 form electronically via mySwarthmore. Paper forms are no longer used, unless you are an international student.

The following instructions are applicable to faculty, staff and students. They are segregated by the following categories:

(1) Current employees (i.e., you currently are working for Swarthmore College)

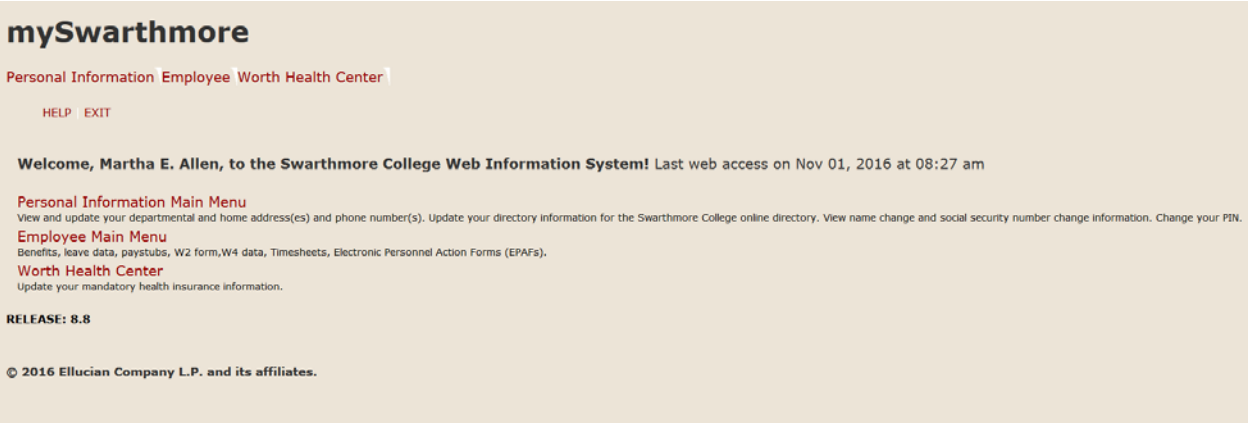
(2) New employees (i.e., you have never worked for Swarthmore College)

(3) Re-hired employees (i.e., you previously held a position at Swarthmore College)

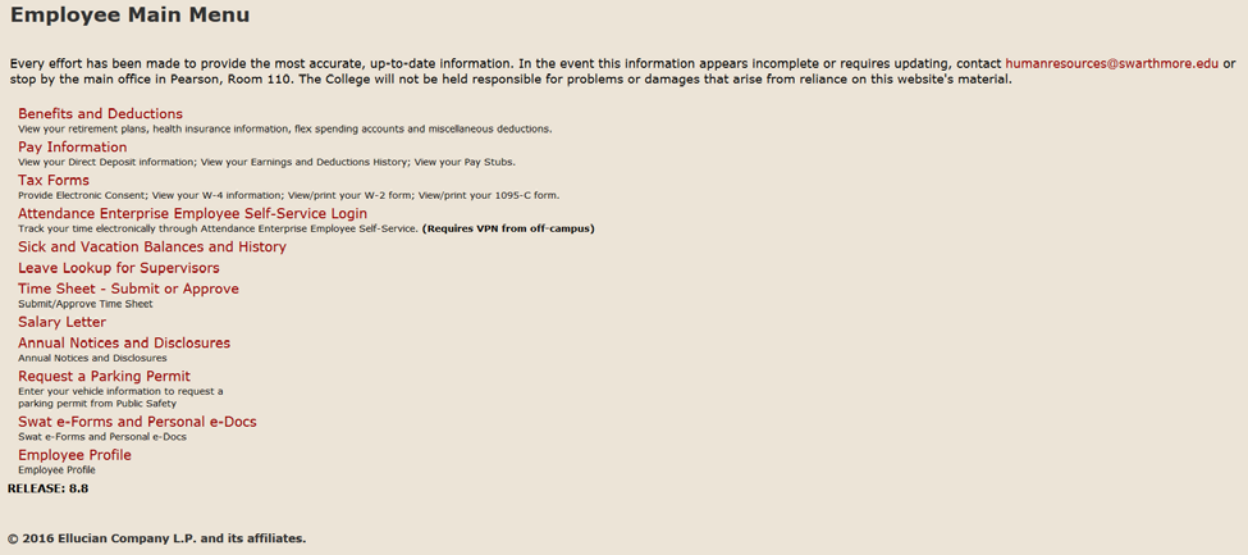
Current Employee Instructions

The following process should be followed after successfully logging in to mySwarthmore to print or update your W-4:

1) Select the link for the Employee Main Menu

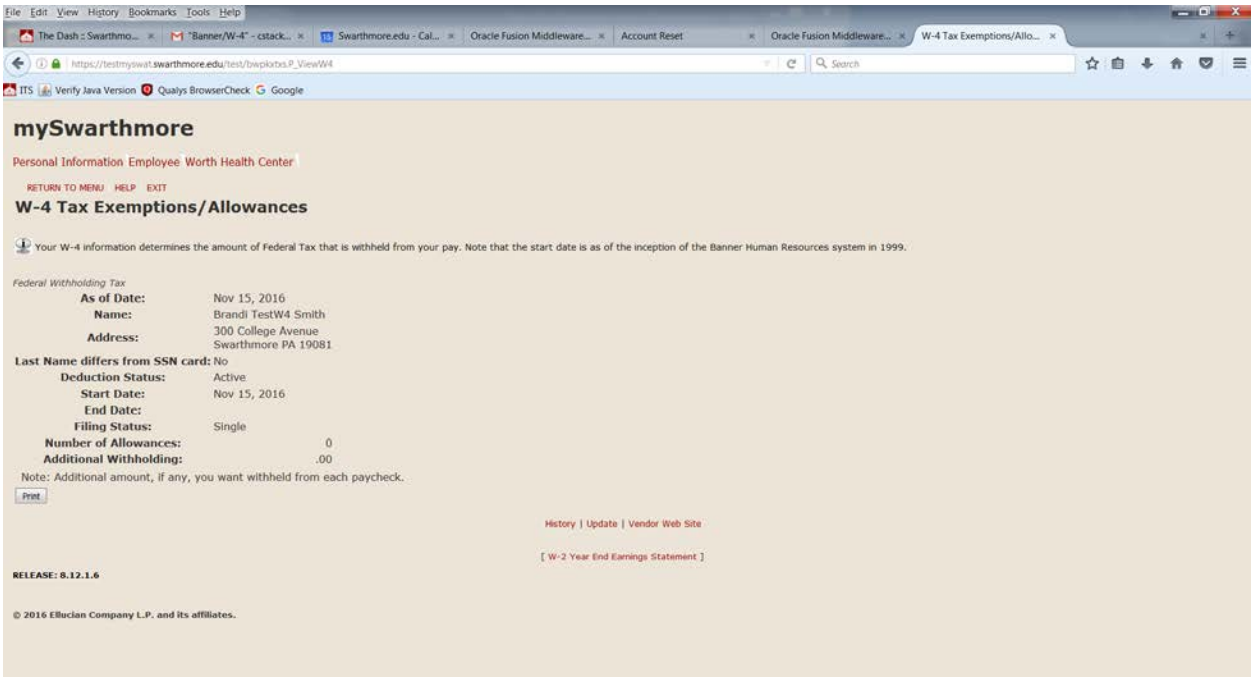


2) Select the link for Tax Forms

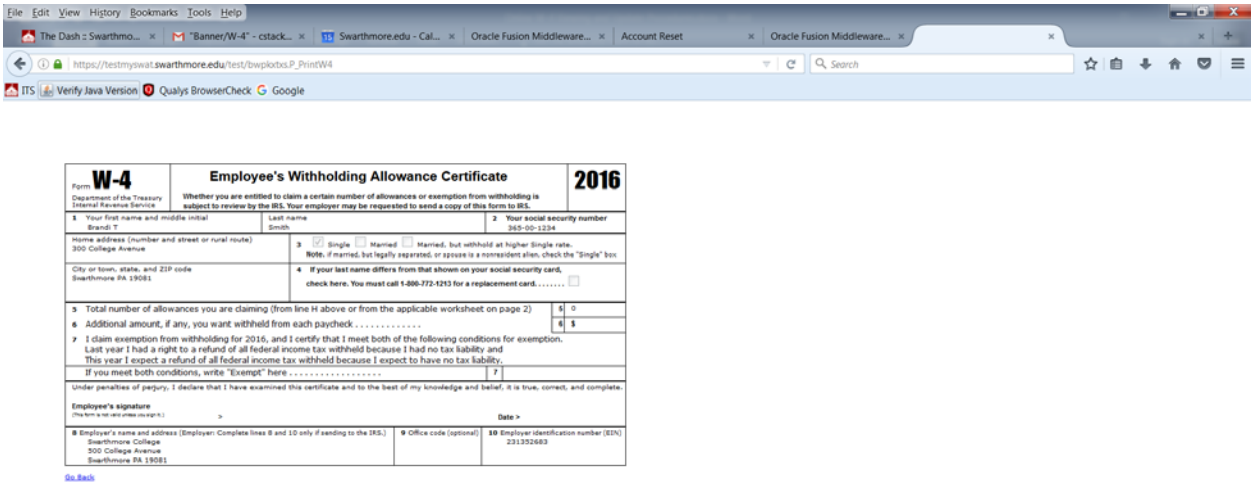


3) Select the link for W-4 Tax Exemptions/Allowances

4) The W-4 Tax Exemptions/Allowance page is displayed with your current W-4 information as of today's date.



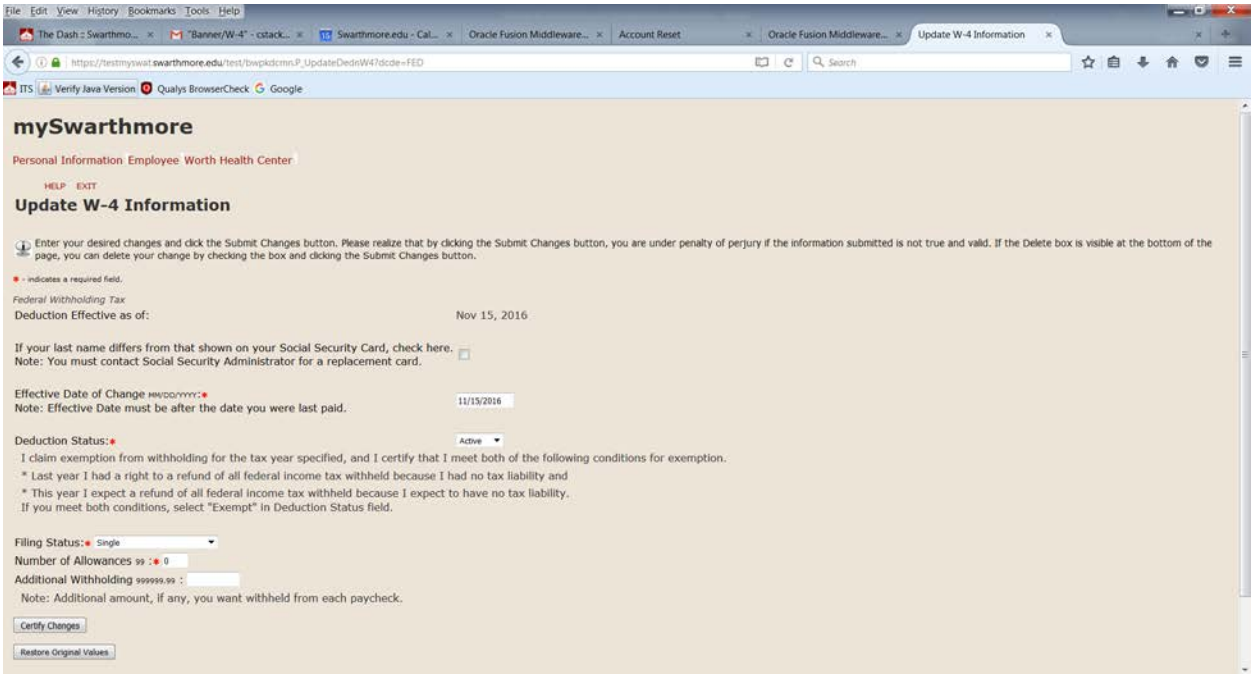
5) If you wish to print your current W-4, select the Print button. Use your browser's print function to print your W-4 form. When finished select the Go Back link to return to the prior page.



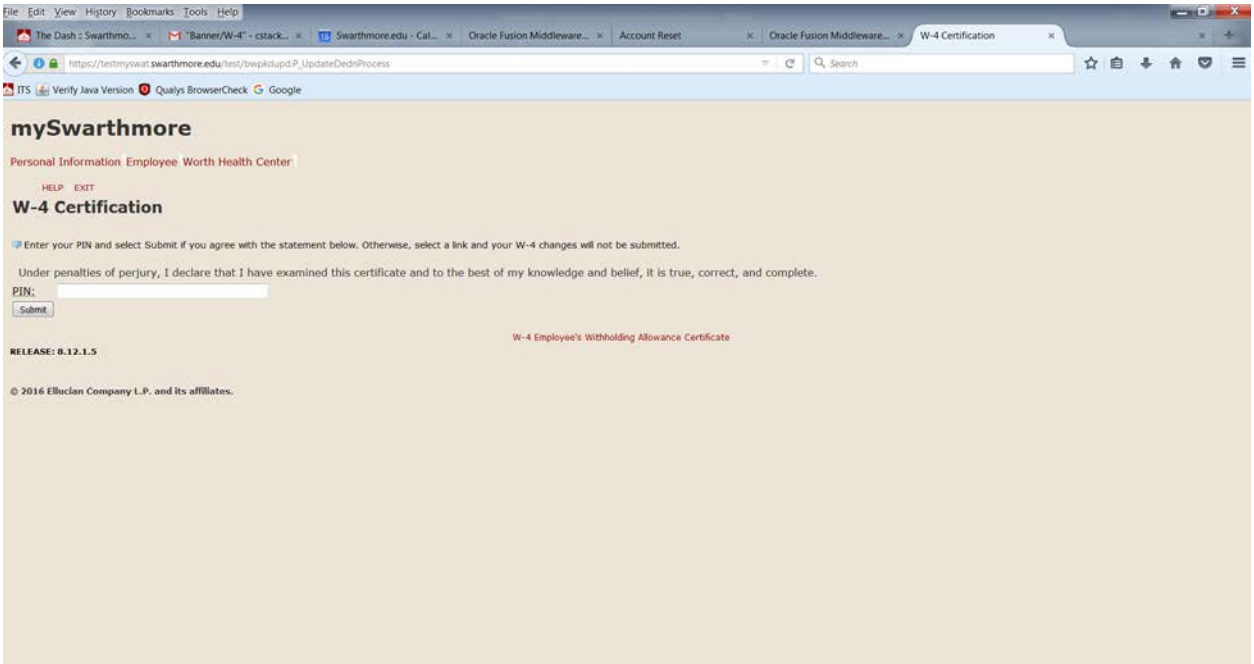
6) To change your W-4 information:
   a) Select the Update link near the center, bottom of the page.
   b) The Update W-4 Information page will be displayed.
   c) For existing employees, you can select the effective date of the change, but it must be a date after your last paid date. The Effective Date will automatically default to the day after the date on which you were last paid.
   d) Make any other changes on this page as desired.
   e) Select the Certify Changes button.

   Caution: If you change your deduction status to Exempt, you must meet the eligibility requirements as stated. You will not have federal taxes withheld from your paycheck. You may be liable additional taxes and IRS penalties as a result. Contact the Payroll office if you have any questions regarding use of this status.

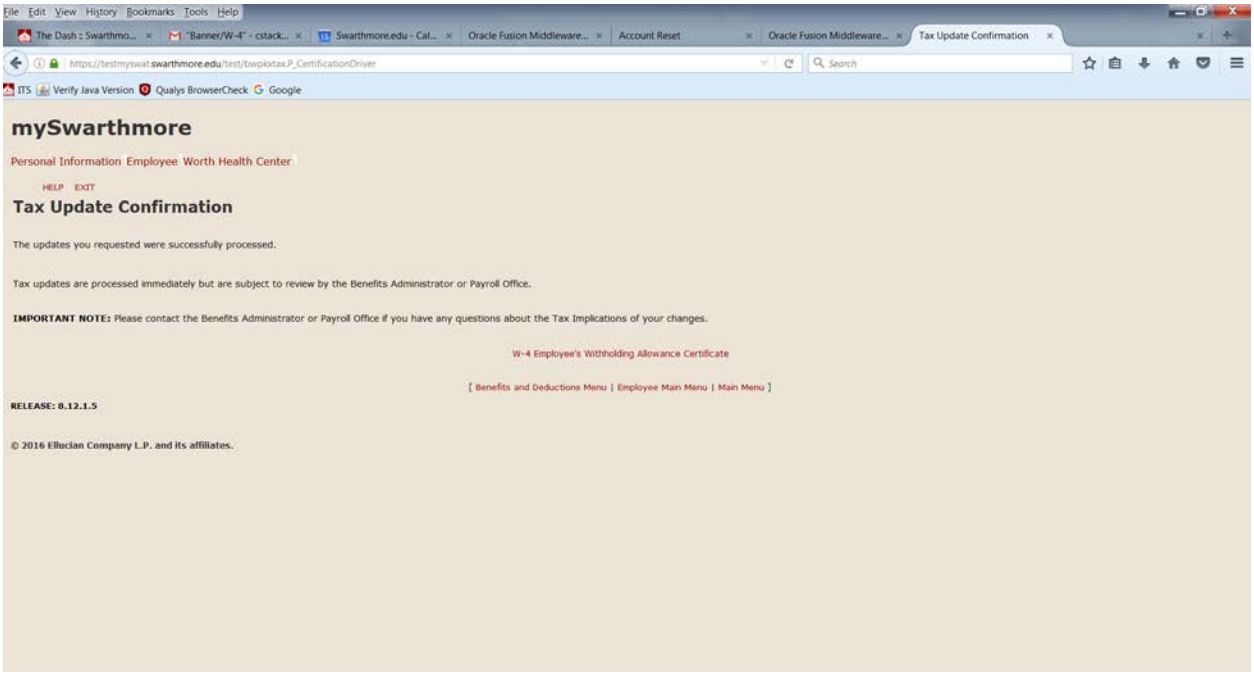
   Note: At any time before you successfully certify your changes, you can select the Restore Original Values button and the page will reset all data.



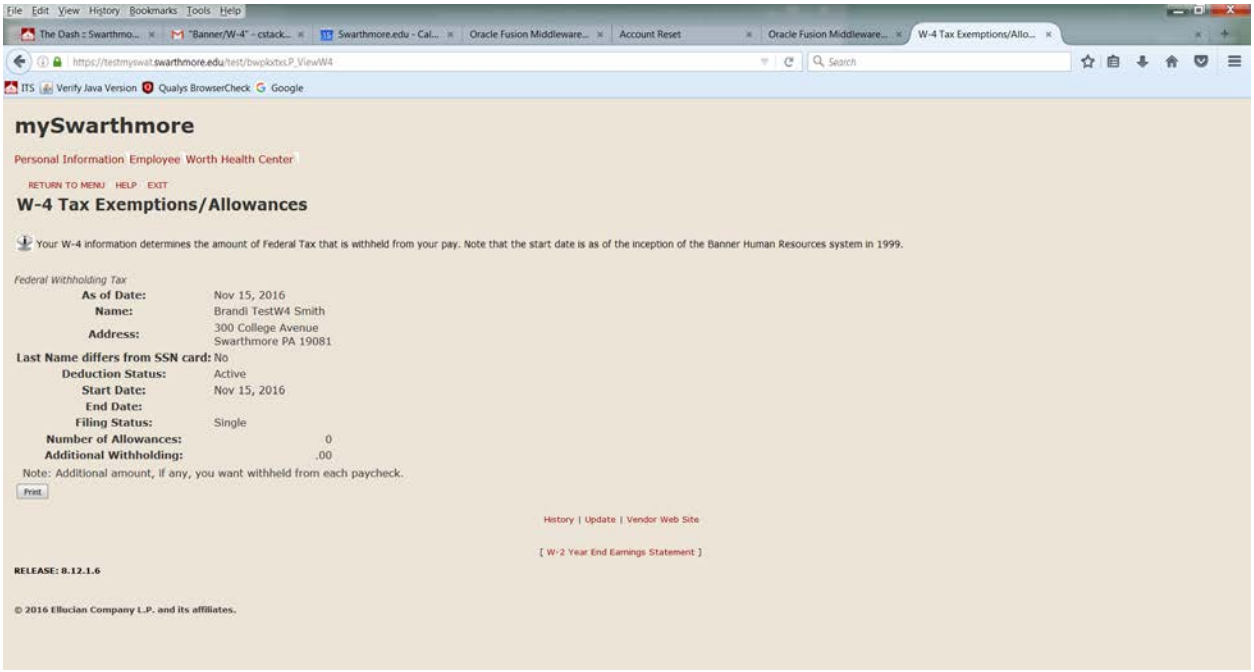
7) When you select Certify Changes, you will be presented with the W-4 Certification page. Enter your **network password** as your PIN and select Submit to sign off on your changes. An electronic audit of the person making the change will be kept on file.



8) If your changes are successfully processed, you will be presented with the following page:



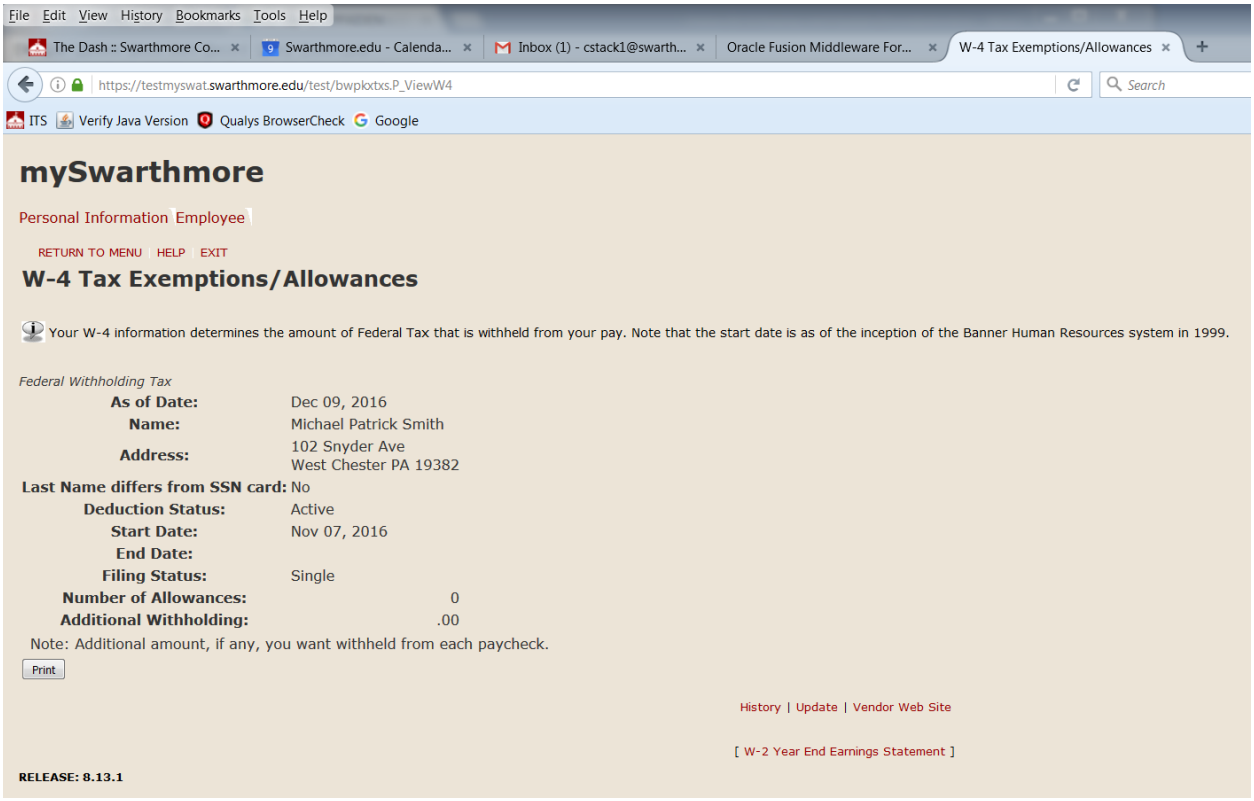
9) You may select the W-4 Employee's Withholding Allowance Certificate link near the bottom of the page to return to the W-4 Tax Exemptions/Allowance page to verify that your changes were processed.



Note: You will not see changes if they take effect in the future; this page shows your information as of today. If you wish to view all of your W-4 information both past and future, select the History link at the bottom of the page.

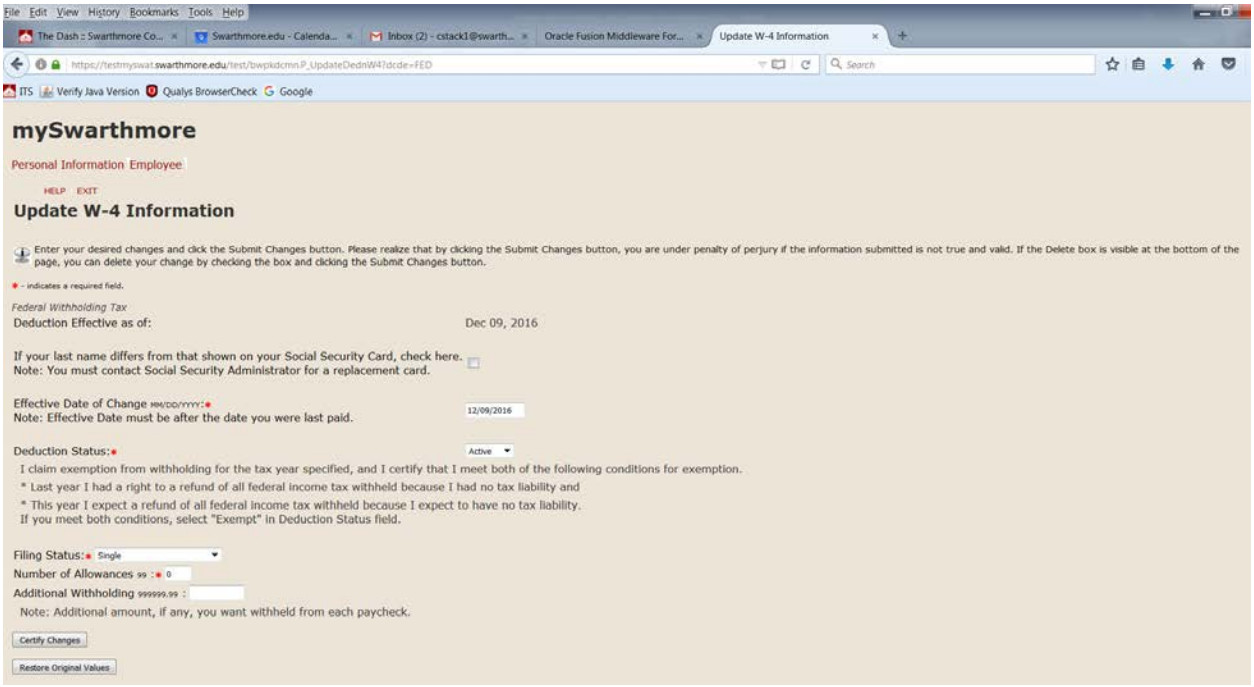
New Employee Instructions

1. Follow steps 1-4 above for Active Employees
2. At step #4, the W-4 Tax Exemptions/Allowances page will show a Filing Status of Single and Number of Allowances as zero. Single and zero are the default values as mandated by the IRS for an employee who has not filed a W-4 with their employer. If these values are correct for you, you do not need to make any changes. You can simply exit the page.



3. As a new employee, if you wish to update your W-4 information, take note of the Start Date. This typically will be your first day of work. The As of Date displayed is today's date and it is reflective of the fact that the information you are viewing is as of today's date.

   Next, select the Update link at the bottom, center of the page. The Update W-4 Information page will be displayed:



4. Enter the Start Date that you noted in the previous step (step #3) in the Effective Date of Change.

   Note: Typically, the Effective Date of Change is your first day of work. Ignore the statement regarding the Effective Date must be after the date you were last paid (as you have not been paid at this point).

   Caution: If the Effective Date of Change is a date in the future, you will be taxed at the Single with zero exemption rate until that date.

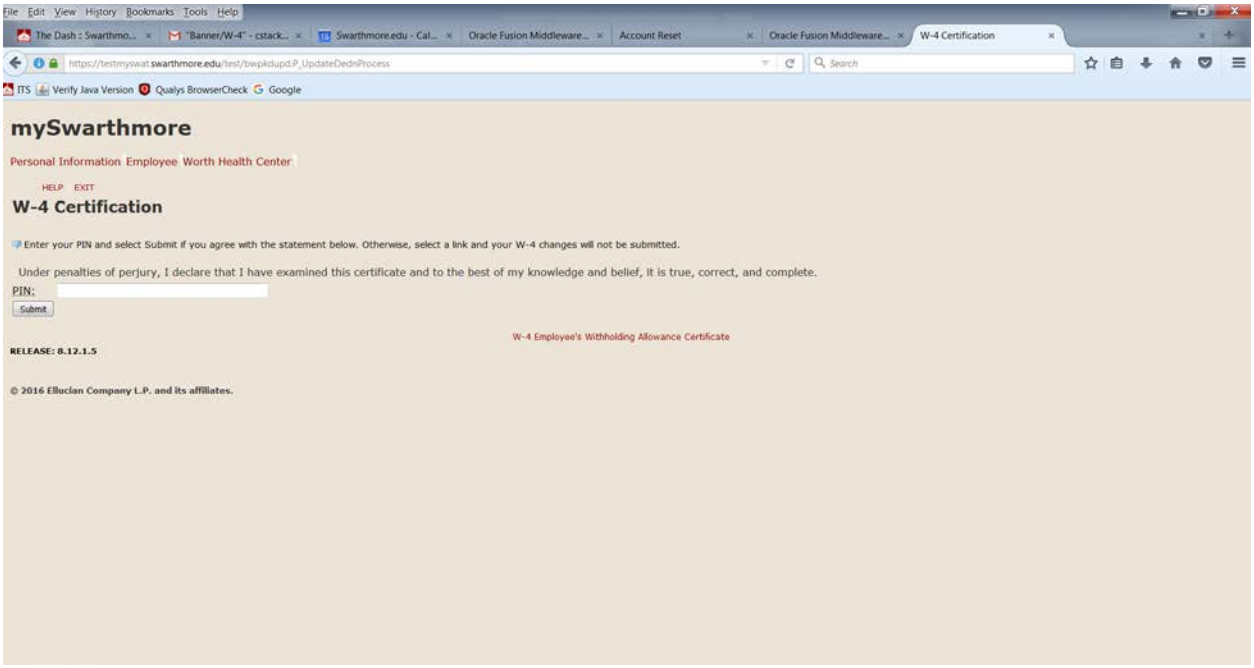
5. Update the Deduction Status, Filing Status, Number of Allowances and Additional Withholding fields as desired.

   Caution: If you change your deduction status to Exempt, you must meet the eligibility requirements as stated. You will not have federal taxes withheld from your paycheck. You may be liable additional taxes and IRS penalties as a result. Contact the Payroll office if you have any questions regarding use of this status.

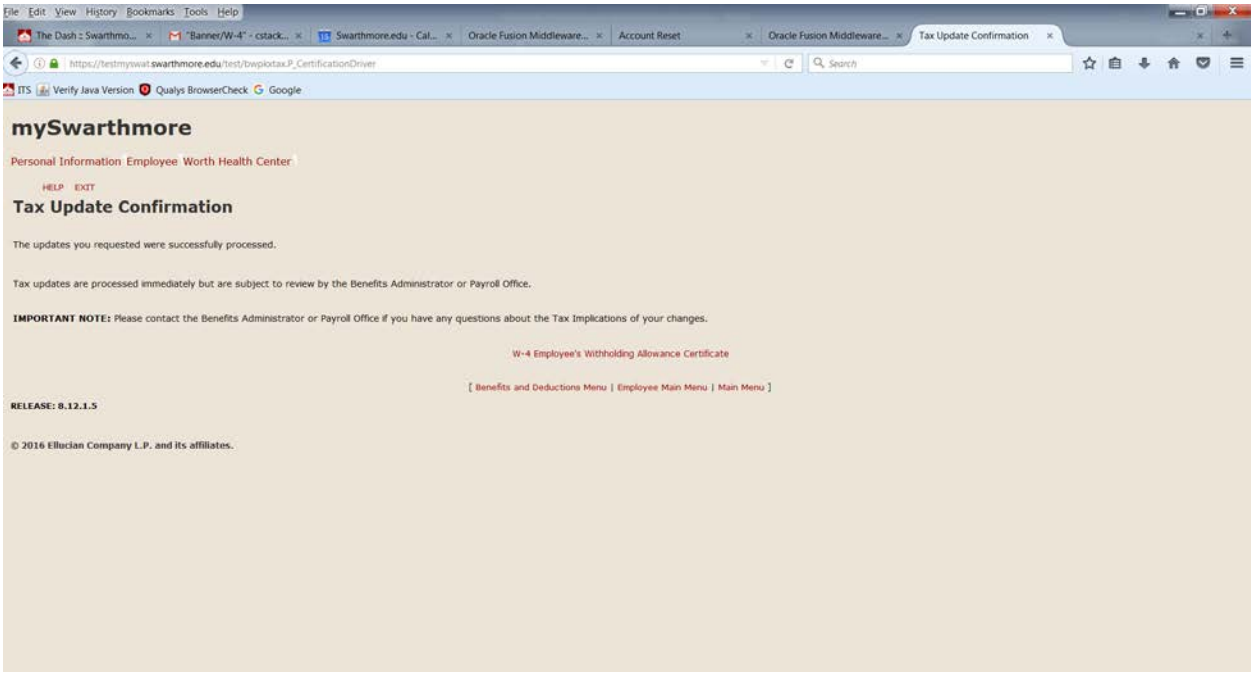
6. Select the Certify Changes button.

   Note: Select the Restore Original Values button if you do not want to save your changes.

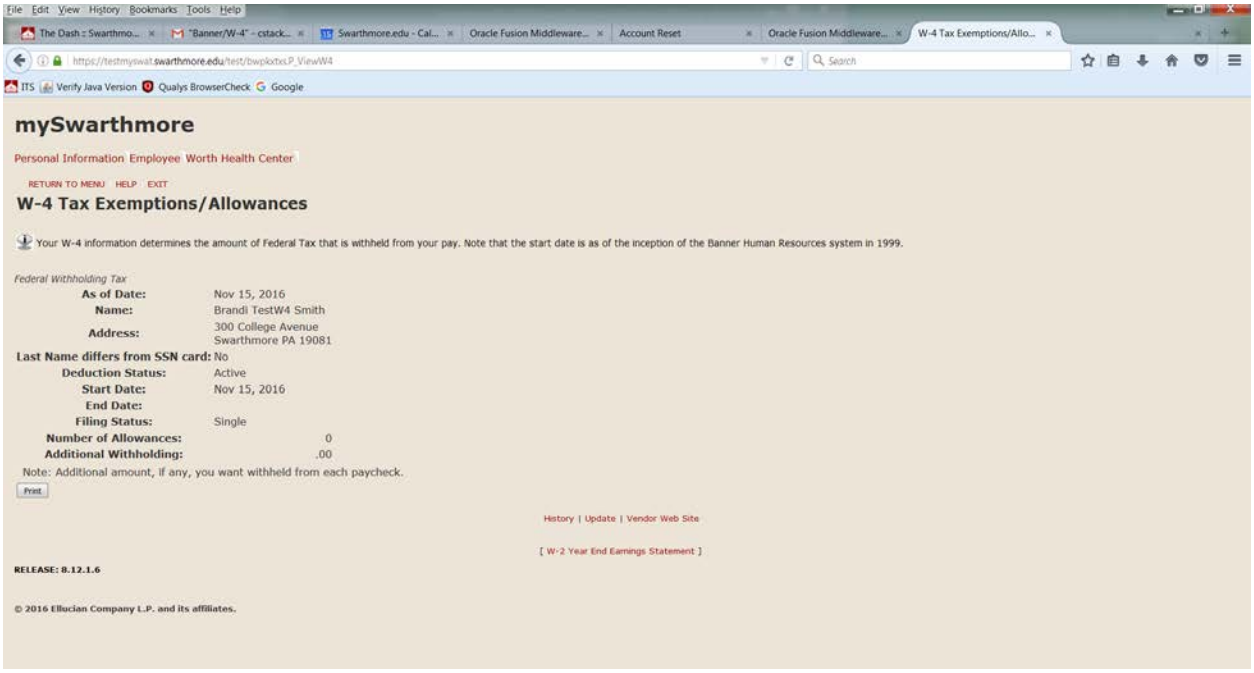
7. When you select Certify Changes, you will be presented with the W-4 Certification page. Enter your **network password** as your PIN and select Submit to sign off on your changes. An electronic audit of the person making the change will be kept on file.



8. If your changes are successfully processed, you will be presented with the following page:



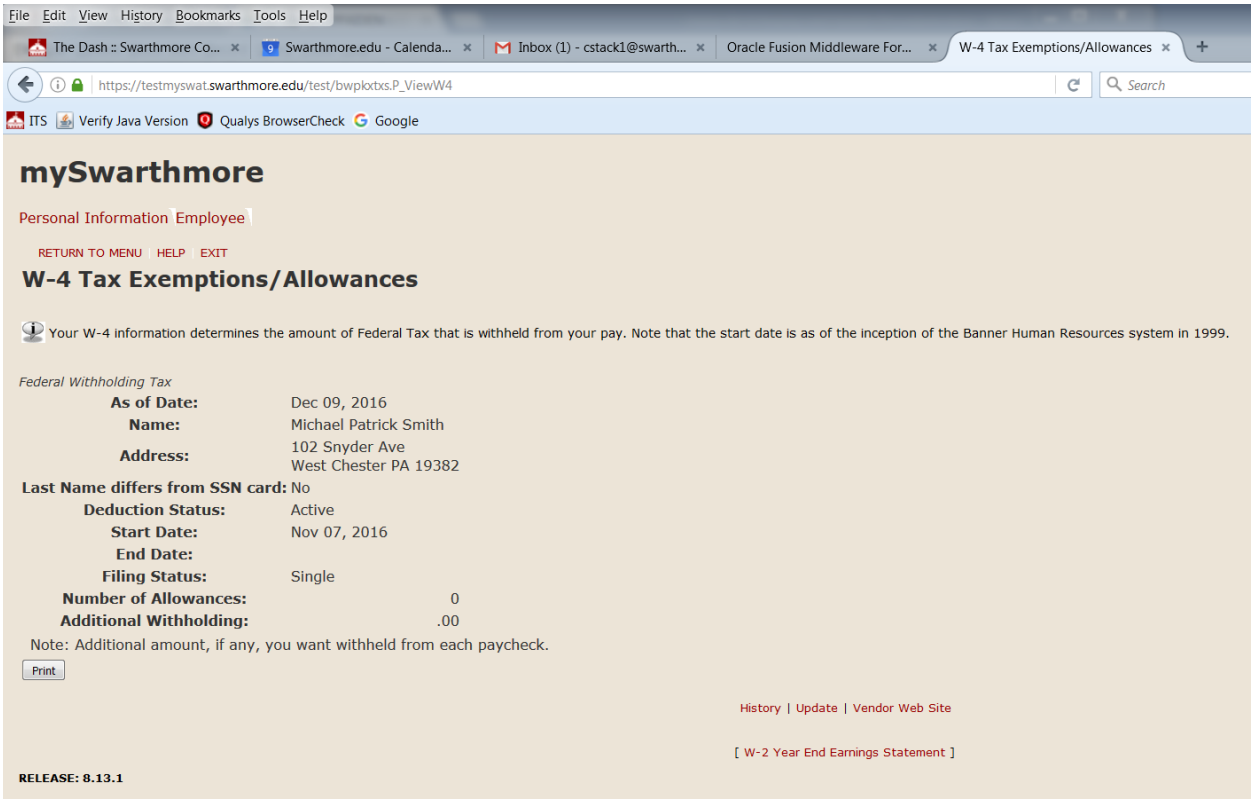
9. You may select the W-4 Employee's Withholding Allowance Certificate link near the bottom of the page to return to the W-4 Tax Exemptions/Allowance page to verify that your changes were processed.



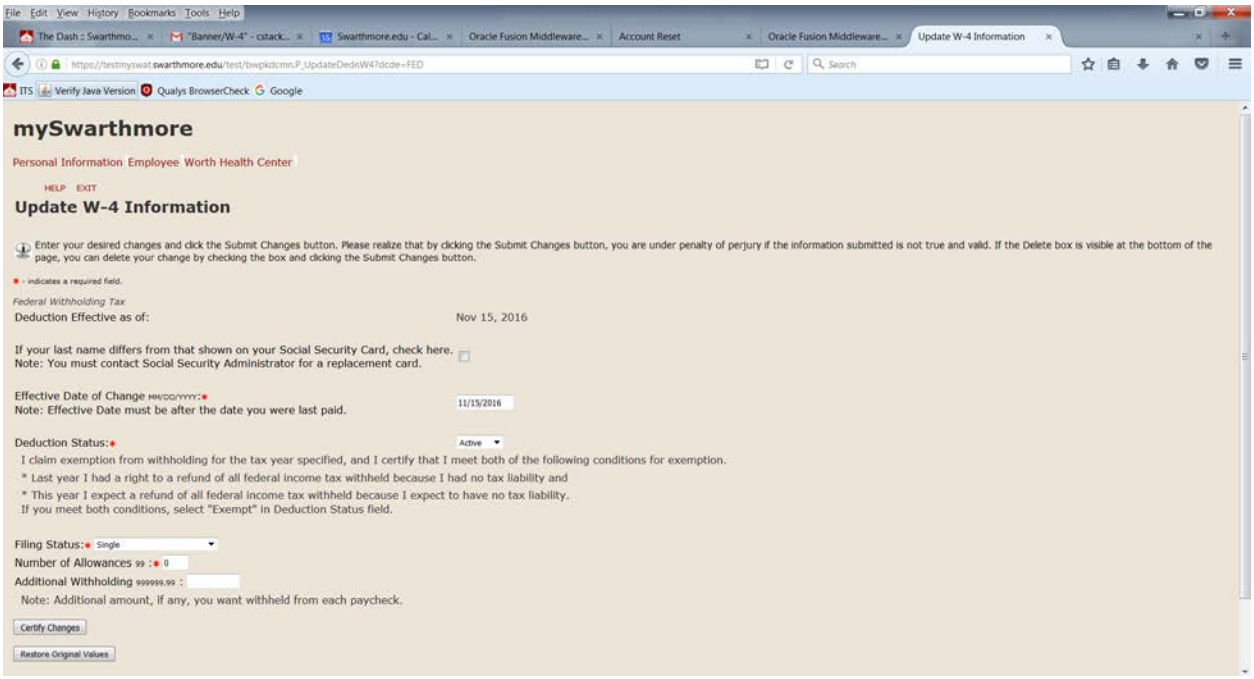
Note: You will not see changes if they take effect in the future; this page shows your information as of today. If you wish to view all of your W-4 information both past and future, select the History link at the bottom of the page. Use the Print button if you wish to print a copy of your W-4 form for your records.

Re-Hired Employee Instructions

1. Follow steps 1-4 above for Active Employees
2. At step #4, the W-4 Tax Exemptions/Allowances page will show the Filing Status and Number of Allowances that you had when you last worked for Swarthmore College. The values displayed are as of today's date (As of Date). If these values are correct for you, you do not need to make any changes. You can simply exit the page.



3. As a re-hired employee, if you wish to update your W-4 information, select the Update link at the bottom, center of the page. The Update W-4 Information page will be displayed:



4. The Effective Date will automatically default to the day after the date on which you were last paid. As this date could be some time in the past, you should change this date to your new start date (i.e., the date you are returning to work for Swarthmore College).

5. Update the Deduction Status, Filing Status, Number of Allowances and Additional Withholding fields as desired.

   Caution: If you change your deduction status to Exempt, you must meet the eligibility requirements as stated. You will not have federal taxes withheld from your paycheck. You may be liable additional taxes and IRS penalties as a result. Contact the Payroll office if you have any questions regarding use of this status.

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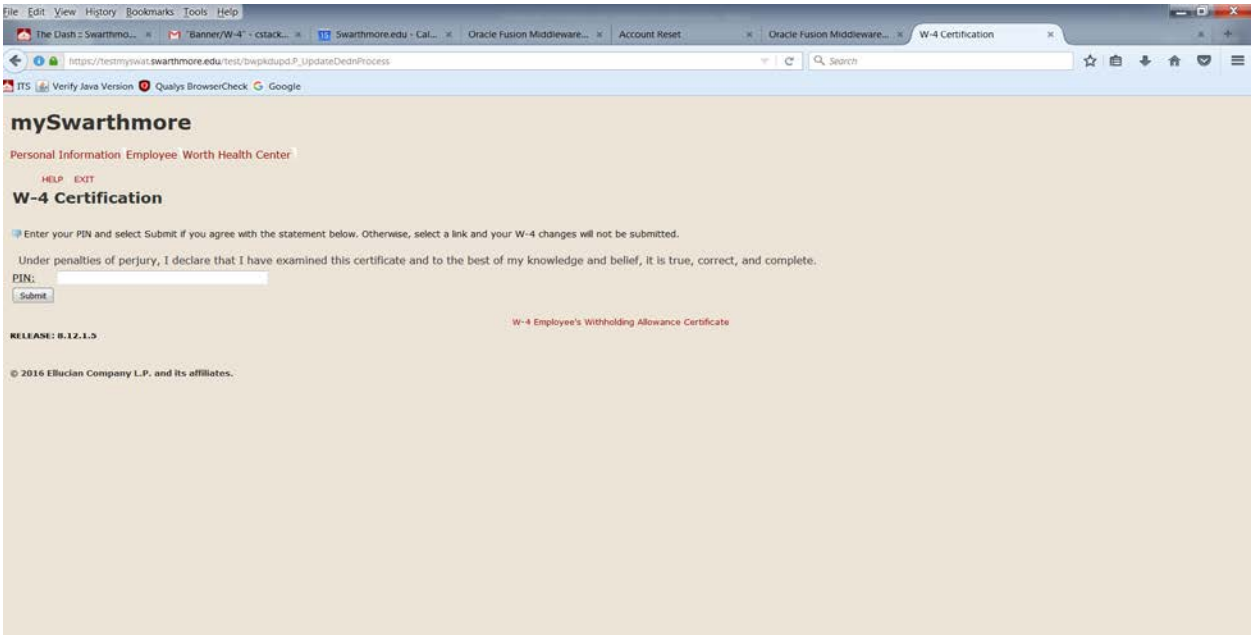

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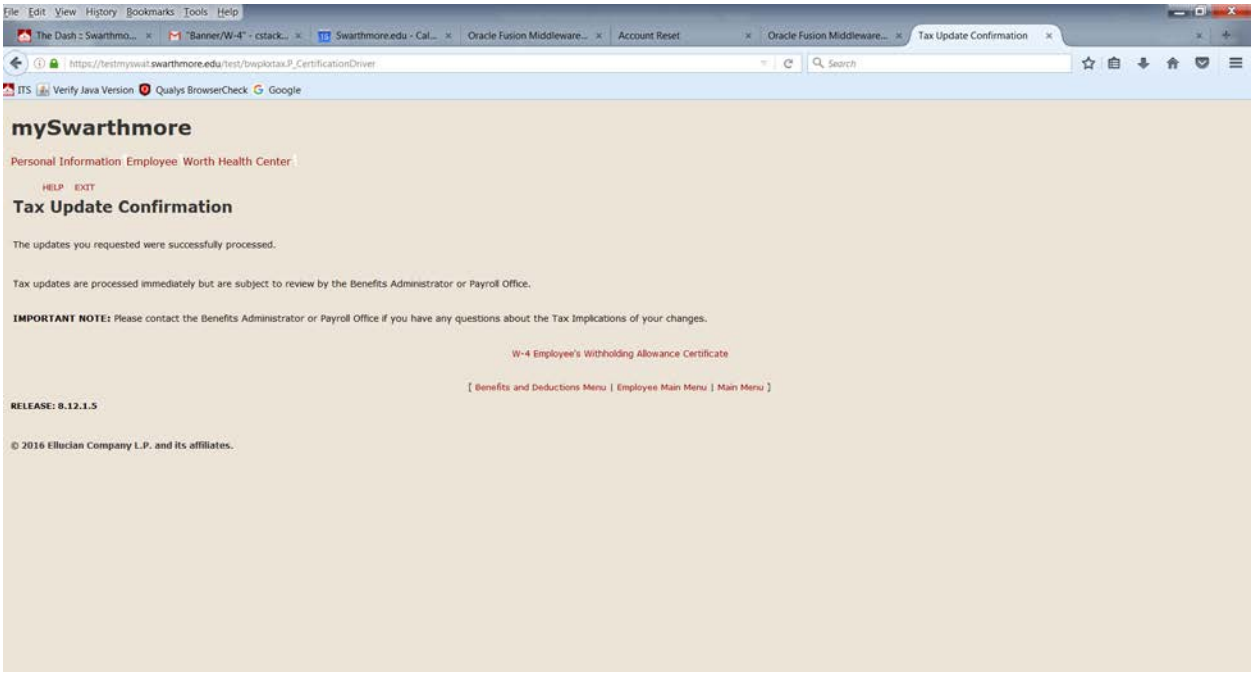

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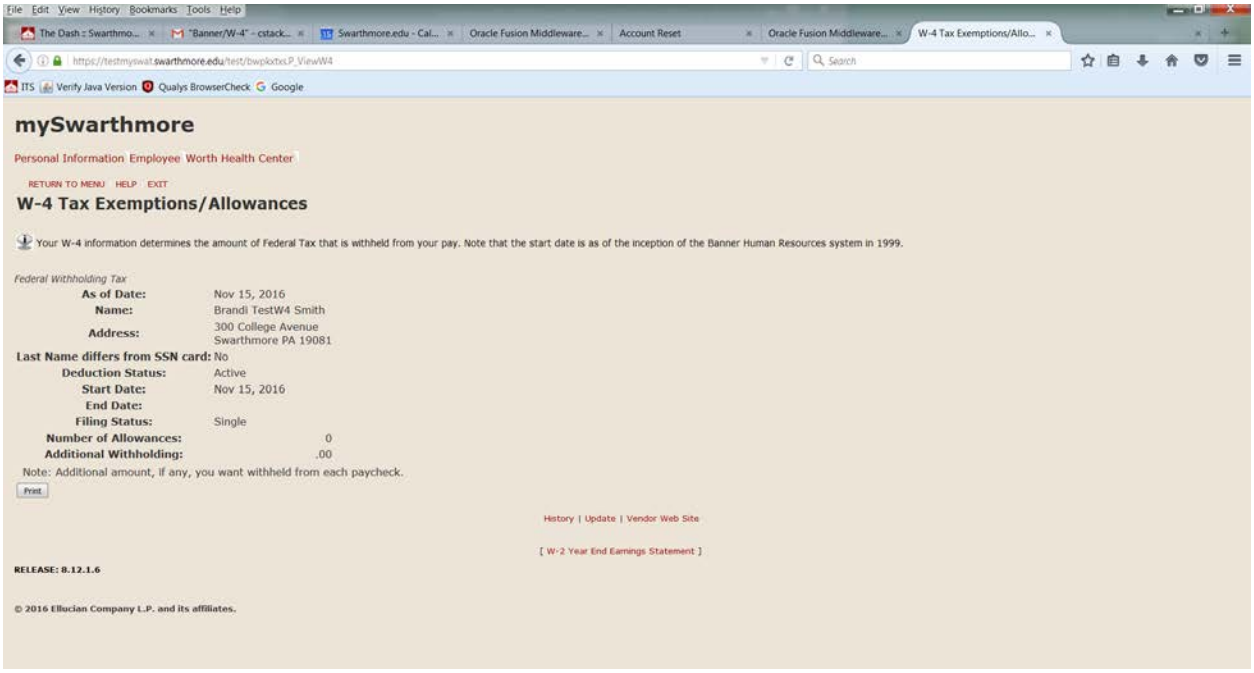

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